

**DEPARTMENT OF FINANCE  
CONFLICT OF INTEREST CODE**

**APPENDIX A  
DESIGNATED POSITIONS, DUTIES, AND CATEGORIES**

POSITION	DUTIES	CATEGORY
Chief Financial Officer	Oversees all aspects of municipal finances including preparation of the annual budget, management of debt and investments, and financial reporting.	Files Form 700 (Statutory Requirement, Govt. Code section 87200)
Director, Development Corporate Partnership Program	The Corporate Partnership Program (CPP) seeks opportunities for the City to generate revenue from partnerships with the corporate community in order to enhance municipal services and facilities in the City. CPP also solicits & acts as primary point of contact for corporate donations to the City in support of City programs & facilities. The Director of Development works closely with other City Departments developing corporate marketing and sponsorship programs which underwrite City-hosted events and promote City Programs.	1
Director, Major Gifts & Philanthropy Planning	Seeks current and deferred donations of valuable property from individuals, families and companies. Working closely with prospective and current donors, as well as their professional advisers, assists in the fulfillment of donors' philanthropic goals. Provides expert guidance regarding philanthropic planning opportunities available to them through the City, as well as potential tax advantages that may arise from charitable donations. Works closely with City Departments to assist their initiatives for acquiring charitable donations and makes available to City personnel technical information and guidance.	1
Consultants	<p>The Chief Financial Officer shall determine in writing whether a consultant shall be required to disclose economic interests in one or more categories listed in Appendix B.</p> <p>The Chief Financial Officer may determine that a particular consultant, although a "designated position," is hired to perform a range of duties that is limited in scope and thus will be required to disclose economic interests in fewer than all categories. The Chief Financial Officer's written determination shall include a description of the consultant's duties and, based upon that description, a statement of the extent of the consultant's disclosure requirements. The Chief Financial Officer's determination is a public record and shall be retained for public inspection in the same manner and location as this Conflict of Interest Code.</p>	3

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APPENDIX B  
DISCLOSURE CATEGORIES

- Category 1** Investments and business positions in any business entity located in or doing business with the City.
- Income and gifts from sources located in or doing business with the City.
- Interests in real property located in the City, including property located within a two-mile radius of any property owned or used by the City.
- Category 2** Investments and business positions in a firm or business entity that supplies goods or services to the City, receives goods or services from the City, that is a tenant of the City, that is an adverse party to the City in a legal proceeding, or that is granted authority by the City to use City facilities.
- Income and gifts from any person or business entity that supplies goods or services to the City, receives goods or services from the City, that is a tenant of the City, that is an adverse party to the City in a legal proceeding, or that is granted authority by the City to use City facilities.
- Interests in real property located in the City of San Diego, including property located within a two-mile radius of any property owned or used by the City.
- Category 3** Consultants:
- Consultants shall be included in the list of designated employees and shall disclose pursuant to the broadest category in the code subject to the following limitation:
- The City Treasurer may determine in writing that a particular consultant, although a "designated position", is hired to perform a range of duties that is limited in scope and thus is not required to fully comply with the disclosure requirements described in this section. Such written determination shall include a description of the consultant's duties and, based upon that description, a statement of the extent of disclosure requirements. The City Treasurer's determination is a public record and shall be retained for public inspection in the same manner and location as this conflict of interest code.